
e-Elections/e-Surveys User guide

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Overview

The e-Elections/e-Surveys tool is available to all McGill Faculties and Units who wish to create an election ballot or a survey online.

Terminology:

Consultation: is the term used to refer to an e-election or an e-survey.

Author: is the person who creates an e-election or an e-survey. Only the author can identify other people to participate in the management of his consultation i.e. edit the content and view the results.

AD: the directory service for Windows which allows to use your McGill Username and password as you login for most McGill systems and helps to create and manage groups, resource accounts, computers, printers and much more.

Before you start

You will need:

- The Surveys and Elections management role. To request it, contact ICS at 514 398-3398 or at itsupport@mcgill.ca
- To identify the people eligible to participate in the election/survey.
 - Prepare the list of people and request an AD group:
 1. Ask an HR representative in your department/faculty to prepare the list of McGill usernames (firstname.lastname@mcgill.ca). See how to find [McGill Usernames](#) at the end of this document.
 2. Request an AD group and an AD group name to ICS (itsupport@mcgill.ca). See the [AD group name standards](#).
 - If you cannot find McGill usernames, prepare the list of people with their McGill IDs and send it to HR (Nancy Wong). Provide the dates of the e-election and the name of people administering it. HR will request a new AD group to ICS.
 - McGill usernames may be entered manually in the e-election parameters.
- To determine the content of the e-election or e-survey: instructions, the choice of candidates and if you wish, their profile, their pictures, CVs or statements, questions to ask.





Tip

If you are planning to have the e-election or e-survey tested by people who do not have access to the consultation as managers, it is recommended to create a test consultation for the testers, and when ready, duplicate it and make the duplicate go live. See [Test a consultation](#).

Access to McGill e-Elections and e-Surveys

URL: <https://mcgill.onmivox.ca>

Login: McGill Username and Password

Omnivox McGill

Access to McGill e-Elections, Online Surveys and other Omnivox services

Identification [En Français](#)

Please enter your McGill Username and Password

Login

McGill Username

john.smith@mcgill.ca

Password Case sensitive

[Forgot your password?](#)

All McGill users of the e-Elections service agree to comply with the Policy on the Responsible Use of McGill Information Technology Resources.

© 2013 Skytech Communications - Security and Payment - Usage conditions - Any questions?



Create an e-election

Process

1. Set up the parameters of the new e-election: title, dates and duration, participant population and the addition of personnel authorized to participate in the management of the consultation.
2. Add the content of the e-election: titles, text and the choice of candidates.

Procedure

Set up the parameters of the e-election

1. On the initial screen, click **Surveys and Elections Management**.

The screenshot shows the McGill Omnivox interface. At the top, the McGill logo and 'Omnivox' are displayed, along with the user name 'Renee Lesage'. The main content area is divided into three sections: 'My Services', 'Calendar of Events', and 'Latest News and Messages'. In the 'My Services' section, there are three items: 'My home page', 'Surveys and Election' (with a sub-link 'Participate in Surveys and Elections'), and 'Surveys and Elections Management' (with a sub-link 'Define targeted Surveys and Elections. View, print and export their results.'). A red box highlights the 'Surveys and Elections Management' item, and a red arrow points to it. The 'Calendar of Events' section shows a calendar for June 2013, with the text 'The calendar has not yet been defined.' below it. The 'Latest News and Messages' section shows 'No news item published at this time'.

My Services

- My home page
- Surveys and Election
Participate in Surveys and Elections
- Surveys and Elections Management**
Define targeted Surveys and Elections. View, print and export their results.
- Reinitialize external services

Calendar of Events

June, 2013

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Events

The calendar has not yet been defined.

Latest News and Messages


No news item published at this time



2. Click **Create a new Election**

Surveys and Elections Management


Instructions


To consult or export the **results** of a consultation, click on the  icon located on its right.


To consult or modify the **parameters** of an existing consultation, click on its title.


To **create** a new consultation, two choices are offered to you:

- to **build a consultation from scratch**, select one of the links hereunder
- to **build a consultation based on an existing one**, click on the consultation to duplicate and then choose the *Create a new consultation based on this one* option. This will copy the existing consultation content and parameters into the new consultation so you can then modify them at will.

 [Create a new Survey](#)

 [Create a new Election](#)

 [Create a new consultation *Teaching evaluation*](#)

 [Create a new consultation *General Public Survey*](#)
no login required and matching your website's design

Display filters -----

☐ Do not display older consultations (completed over a month ago)

No	Title	Status	Receipt of answers	Nb Participants	Consultation Type	Results
----	-------	--------	--------------------	-----------------	-------------------	---------



The **New Election** window appears

- Fill in the **General information** section with the exception of the **Mode** and the **Demographics of participants**. Those two items do not apply to the McGill set up.

Surveys and Elections Management New Election

Instructions
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

General information

Title
The title identifies the consultation, for both its managers and respondents.

Start date at

End of consultation at

Mode This parameter can still be edited once the consultation has begun.

☒ **Optional**
The system will allow the users to take part in the consultation through the "Surveys and Election" module. A notification in the users' "What's new" section will also inform them of the presence of an uncompleted consultation.

☐ **Mandatory with possibility of completing later**
The system will ask the users to take part in the consultation before they access any Omnivox service. However, the user will be able to choose to take part in the consultation later. Note: as long as the user has not participated, when he accesses Omnivox, the system will ask him again to take part in the consultation.

Number of "complete later" allowed before forcing the user to answer:
Allows a maximum of X access to other Omnivox services before forcing the user to answer the consultation. After this number of access, the user will have no other choice than to fill the consultation before being able to use any other Omnivox service.

Demographics of participants

☐ Collect demographic data of participants

☒ **Do NOT collect demographic data of participants**
The demographics of the participants appear in the results and include:

- the starting date
- the ending date
- the length
- the type of individual (student, teacher, employee)
- the IP address
- the program
- the faculty
- the sex
- the sector of study

- Enter the **Title**: it will appear on the e-election
- Enter the **Start Date**: **do not enter the real date**. Enter a date in a far future and when you are ready to go live, you will be able to edit the consultation and enter the proper date (see [Edit a consultation](#)). Once the consultation is started, the date cannot be changed anymore.



- c) Enter the **End of consultation** date. It is the date and time at which the election will end. It must be at a later date than the start date. The end date can always be changed even if the consultation has started.
 - d) Check off **I cancel my vote** if you want to give the opportunity to voters to cancel their vote.
4. Specify the participants of the election.

- a) To specify an AD group, go to the **Filters** section:

1. Click **+ Add a group from the University's directory**. The groups list appears.
2. Click a group on the left side to select it.
3. Click **Save**

Note

The groups in the list are AD groups. To add a new group in the list of groups, send a list of people with their McGill IDs to HR (Nancy Wong). HR will send the list of McGill Usernames to ICS who will create a new AD group.



- b) To add eligible voters who are not part of an AD group, go to the **List of participants to this consultation, regardless of previous filters**.
- Enter the McGill Usernames in the **List of employees**.

List of participants to this consultation, regardless of previous filters

The students and employees in the lists below will have access to the consultation regardless of the filters specified in section Filters.

List of students

To import a student list from a text file, [click here](#).

Input the list of students (by Student Number) that can participate in the consultation. Separate the student numbers by carriage returns.

You may also simply paste the data above from data copied from an Excel column or an Access table.

You can also import a list of students from a text file containing the Student Numbers separated either by carriage returns, semicolons, colons, or the space character.

List of employees

walt.disney@mcgill.ca
william.shatner@mcgill.ca

To import an employee list from a text file, [click here](#).



Tip

If you are not ready to select an AD group but want to save the e-election as an initial draft, simply enter your McGill Username in the **List of employees**. Once you are ready to select a group, remove your username from the list.



5. If needed, give individuals the permission to manage the e-election. They will be able to edit the election and view the results.

Go to **Accessibility restrictions to this consultation's management**. This section shows the list of people having access as Surveys and Elections managers.

To give individuals the permission to manage the e-election, check off their McGill Username.

Accessibility restrictions to this consultation's management

Authorized personnel that can access management and results of this consultation

<input checked="" type="checkbox"/>	RENEE.LESAGE@MCGILL.CA - Renee Lesage
<input type="checkbox"/>	MICHAEL.SAMPSON@MCGILL.CA - (ICS) Michael
<input type="checkbox"/>	RODNEY.JEAN-PAUL@MCGILL.CA - (ICS) Rodney
<input type="checkbox"/>	ANDREW.BITEEN@MCGILL.CA - Biteen (Secr) Andrew
<input type="checkbox"/>	CHRISTINE.CHEHADE@MCGILL.CA - Chehade (Secr) Christine
<input type="checkbox"/>	JOSIE.DAMICO@MCGILL.CA - D'Amico (Science) Josie
<input type="checkbox"/>	PAULINE.FRIXIONE@MCGILL.CA - Frixione (Secr) Pauline
<input type="checkbox"/>	MARCUS.GILLIAM@MCGILL.CA - Gilliam (ICS) Marcus
<input type="checkbox"/>	NORMAN.KLING@MCGILL.CA - Kling (ISR) Norman
<input checked="" type="checkbox"/>	DAN.OCONNELL@MCGILL.CA - O'Connell (ICS) Dan
<input type="checkbox"/>	ANGIE.PSARAKOS@MCGILL.CA - Psarakos Angie
<input type="checkbox"/>	SUSAN.SHARPE@MCGILL.CA - Sharpe (Arts) Susan
<input type="checkbox"/>	MARINA.TARTAKOVSKAIA@MCGILL.CA - Tartakovskaia Marina
<input type="checkbox"/>	JENNIFER.VIENS@MCGILL.CA - Viens (Arts) Jennifer
<input type="checkbox"/>	MALEK.YALAOUI@MCGILL.CA - Yalaoui (Science) Malek

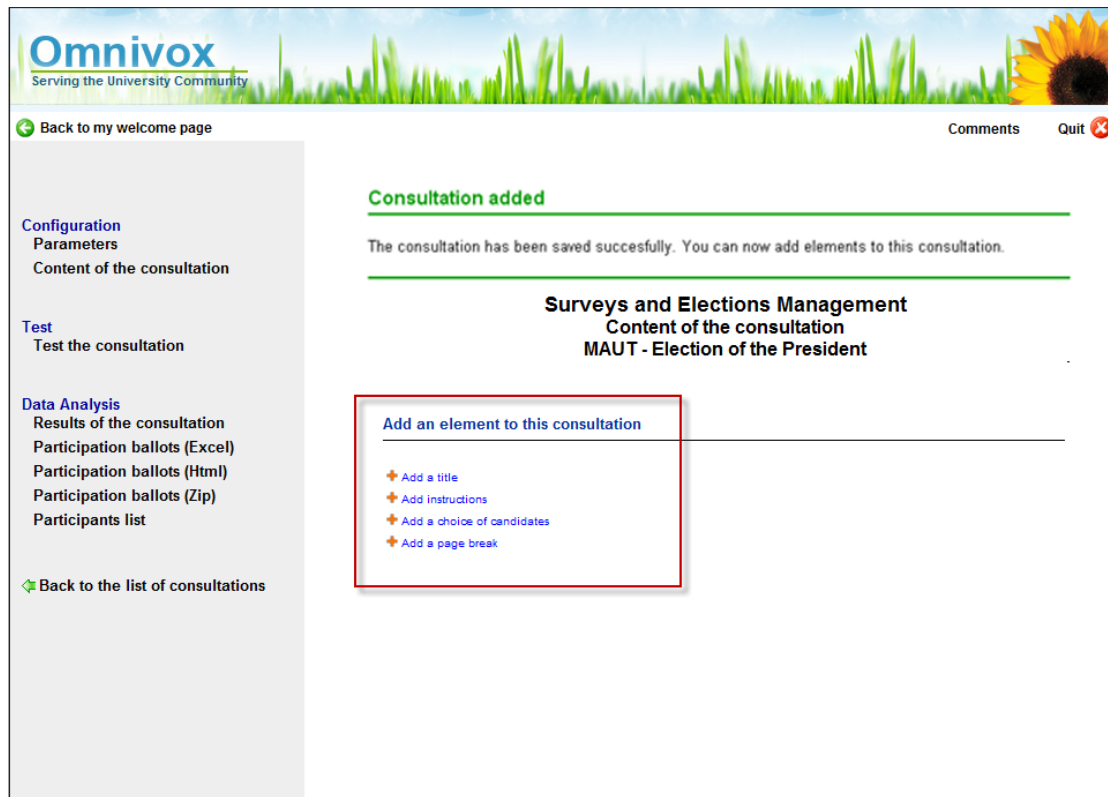
Only those persons who have access to the «Surveys and Elections Management» module appear on this list. To add another employee to the list, the person responsible for the «Management Interface» must give them access to the «Surveys and Elections Management» module.

Note

Once a consultation has begun, no one can modify the content.

6. Click **Add**. The following screen appears.





Add the content of the e-election

There is a choice of 4 elements to add to the content:

- A **title**: it is not required since the overall title of the election was defined in the first step of the election creation. However multiple titles may be added, for example if the ballot has multiple parts. Click **Add a title** every time you want to add a new title.
- **Instructions**: any text that you want to add to the content. Multiple paragraphs may be added on different parts of the content. Click **Add instructions** every time you want to add new text.
- The **choice of candidates**: the list of candidates with a photo if desired and a web link to their statements. You can add multiple lists of candidates. For example, add a choice of candidates for the election of the president and add another choice of candidates for the election of committee members. Click **Add a choice of candidates** to add a new choice of candidates.
- A **page brake**: at least one page break is required. Click **Add a page break** every time you want to add a new page break.



Tip

You can use HTML tags to format text such as changing color, making text bold, changing the font size or adding a hyperlink. To learn more about HTML tags, see the [Appendix - HTML code](#).

See an example of e-election content on the next page.



Global Title

This election ballot has two parts, one for the election of the president of our association and the second for two members of the Council.

Instructions

Election of the president Title

There are three candidates to the presidency:

Melissa Nguyen

Melissa currently teaches upper year courses in civil engineering. She has been at McGill 15 years. She is a member of the Canadian Association of University teachers.

Robert Young




Robert has joined the association in 1995 and became in 2001 a member of the Tenure and Mentoring Committee. He was elected V.P. internal in 2009.

Thierry Singer

Thierry is presently the chair of the remuneration Committee. He has been an academic advisor for 10 years.

Instructions

1. Please vote for your favorite candidate

- ☐  Melissa Nguyen
[Consult the candidate's statement](#)
- ☐  Robert Young
[Consult the candidate's statement](#)
- ☐  Thierry Singer
[Consult the candidate's statement](#)

Choice of candidates

1 2 3

 Next

Page break

Number of pages

Add a new title

1. Click **Add a Title**

Omnivox
Serving the University Community

Back to my welcome page

Configuration
Parameters
Content of the consultation

Test
Test the consultation

Data Analysis
Results of the consultation
Participation ballots (Excel)
Participation ballots (Html)
Participation ballots (Zip)
Participants list

Back to the list of consultations

Consultation added

The consultation has been saved successfully. You can now add elements to this consultation.

Surveys and Elections Management
Content of the consultation
MAUT - Election of the President

Add an element to this consultation

- ✦ Add a title
- ✦ Add instructions
- ✦ Add a choice of candidates
- ✦ Add a page break

2. Enter the title in the **Text** box.
3. In the **Insert position** dropdown list, select where you want the title to be added in the content.
4. Click **Add**.

Surveys and Elections Management
Content of the consultation
MAUT - Election 2013

New title

Text

Part 3 of the ballot

Settings

Insert position

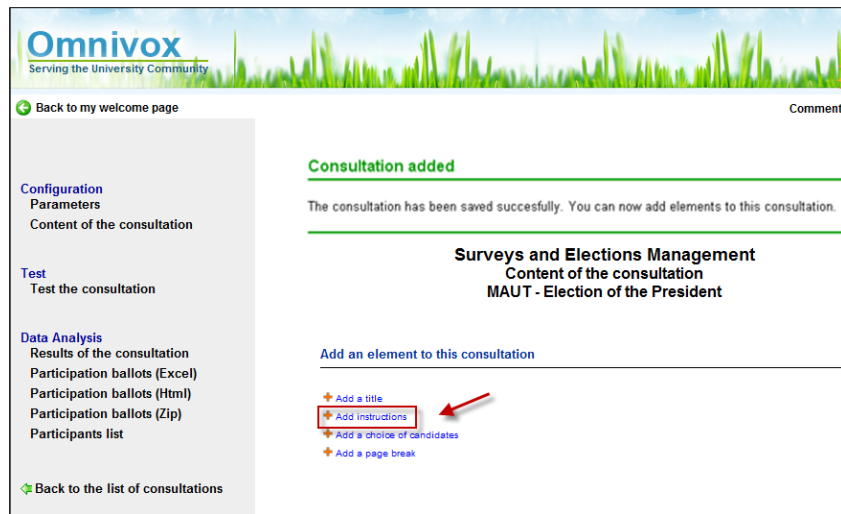
- after the instructions - Thank you for your participation
- at the beginning of the consultation
- after the instructions - This election ballot has two parts, one for the election of...
- after the title - Election of the president
- after the instructions - There are three candidates to the...
- after the question 1 - <big>Please vote for your favorite...
- after the page break - Page break
- after the title - Second part
- after the question 2 - Please vote for two Committee members
- after the page break - Page break
- after the instructions - Thank you for your participation

Back to the content

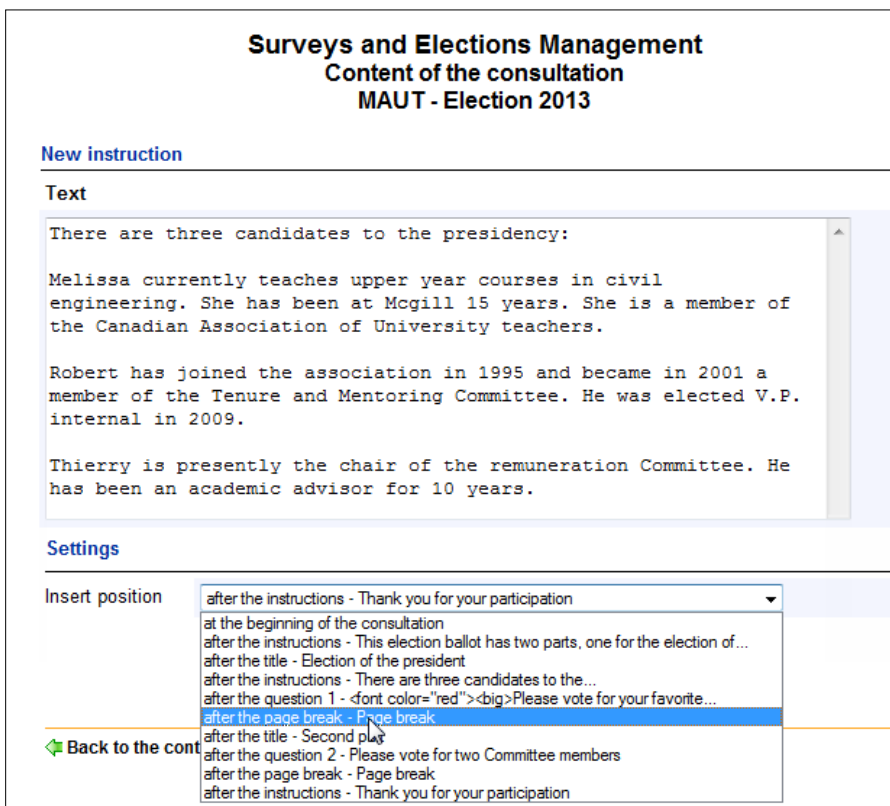


Add new text

1. Click **Add instructions.**



2. Enter the text in the **Text** box.
3. In the **Insert position** dropdown list, select where you want the text to be added in the content.
4. Click **Add**.



Add a new choice of candidates

1. Click **Add a choice of candidates**.

The screenshot shows the Omnivox web application interface. The header includes the Omnivox logo and the tagline 'Serving the University Community'. A sidebar on the left contains navigation links: 'Back to my welcome page', 'Configuration' (Parameters, Content of the consultation), 'Test' (Test the consultation), and 'Data Analysis' (Results of the consultation, Participation ballots (Excel), Participation ballots (Html), Participation ballots (Zip), Participants list). The main content area displays a green success message: 'Consultation added' and 'The consultation has been saved successfully. You can now add elements to this consultation.' Below this, the title 'Surveys and Elections Management' and 'Content of the consultation' are shown, followed by 'MAUT - Election of the President'. A section titled 'Add an element to this consultation' contains four options: 'Add a title', 'Add instructions', 'Add a choice of candidates' (highlighted with a red box and a red arrow), and 'Add a page break'. At the bottom left of the sidebar, there is a link 'Back to the list of consultations'.

2. It is required to add text in the **Text** box.
3. In the **Insert position** dropdown list, select where you want to add the choice of candidates in the content.

This screenshot shows the 'New choice of candidates' form within the 'Surveys and Elections Management' application. The title is 'Surveys and Elections Management' with the subtitle 'Content of the consultation' and 'MAUT - Election 2013'. The form is divided into sections: 'New choice of candidates', 'Choice of candidates parameters', 'Text', 'Settings', and 'Candidates'. The 'Text' section contains a text area with the placeholder text 'Please vote for two Committee members'. The 'Settings' section includes an 'Insert position' dropdown menu set to 'after the page break - Page break'. Below this, there are three radio button options for the number of candidates to be chosen: 'The participant must choose only one candidate.', 'The participant must choose between 2 and 2 candidates.' (which is selected), and 'The participant must place between and candidates in preferential order.' The 'Candidates' section at the bottom has a link 'Add a candidate'.



4. Select the **Number of candidates to be chosen**. Either
 - a. Only one candidate.
 - b. Multiple candidates. Select the number of candidates. For example, if 2 candidates must be chosen, select: **The participant must choose between '2' and '2' candidates**.
 - c. Multiple candidates in preferential order. For example, if 3 candidates must be chosen, select: **The participant must place between 3 and 3 candidates in preferential order**.
5. Add the candidates: click **Add a candidate**

Candidates

1.	NO PHOTO Add the photo	Text	Barbara Sinclair	Remove
		Hyperlink to the candidate's Curriculum Vitae	tp://www.mcgill.ca/law/about/profs	

[+ Add a candidate](#)

Add

- a. Enter the candidate's name in the **Text** box.
- b. If you wish, click **Add the photo** to show the candidate's picture. The following window will pop-up. Click **Browse** to find the picture on your computer and upload it.

Add/Modify the photo for candidate# 1

Click on the "Browse" button to go select the photo to be associated with this candidate. Once you are done click on the "Save" button to save the photo.

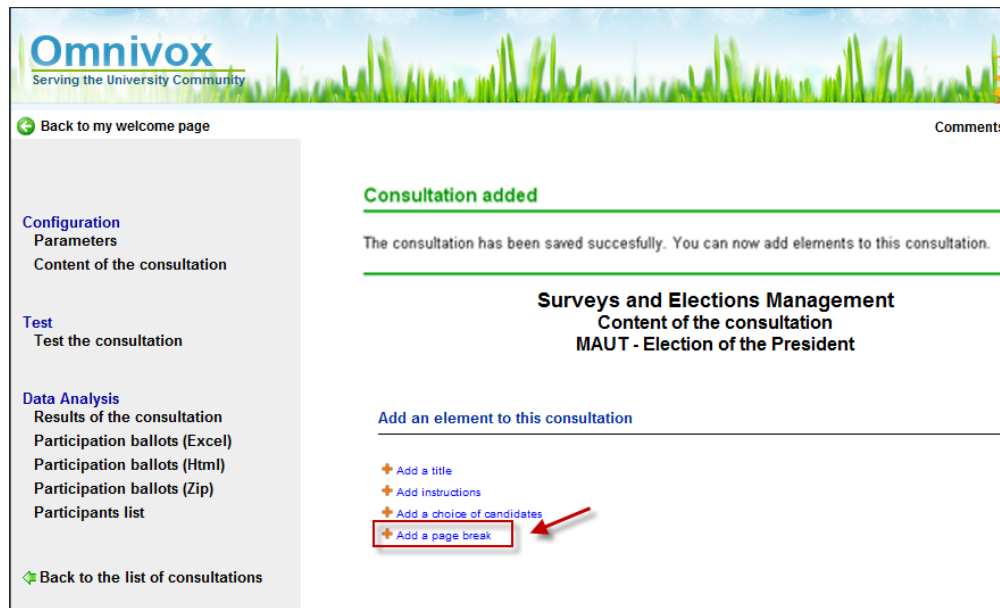
Browse...

Save

- c. If the candidate has a statement on a web site, enter the URL in the box where it says: **Hyperlink to the candidate's Curriculum Vitae**. In the voter's view, it will show the link "Consult the candidate's statement".
6. To add more candidates, click **Add a candidate** and repeat steps a) to c) above.
7. Click **Add**.

Add a new page break

1. Click **Add a page break**. It is required to add a least one page brake.



The following screen appears:

1. Default text appears in the **Text** box. There is no need to change it since it does not show on the voter's view.
2. In the **Insert position** dropdown list, select where you want to add the choice of candidates in the content.
3. Click **Add**.



Preview a consultation

- Once the elements are added to an election or a survey, they are listed on the **Content of the consultation** page.

To preview a specific element, click the **Preview** icon.

Comments Quit

Surveys and Elections Management Content of the consultation MAUT - Election 2013

[Add an element to this consultation](#)

[+ Add a title](#)
[+ Add instructions](#)
[+ Add a choice of candidates](#)
[+ Add a page break](#)

Add a choice of candidates based on the following choice of candidates:
















1. <big>Please vote for your favorite... [Add](#)

Move an element to a new position:

Element to move: Instructions - This election ballot has two parts, one for the election of the...

New position: at the beginning of the consultation [Move](#)

List of elements in the consultation

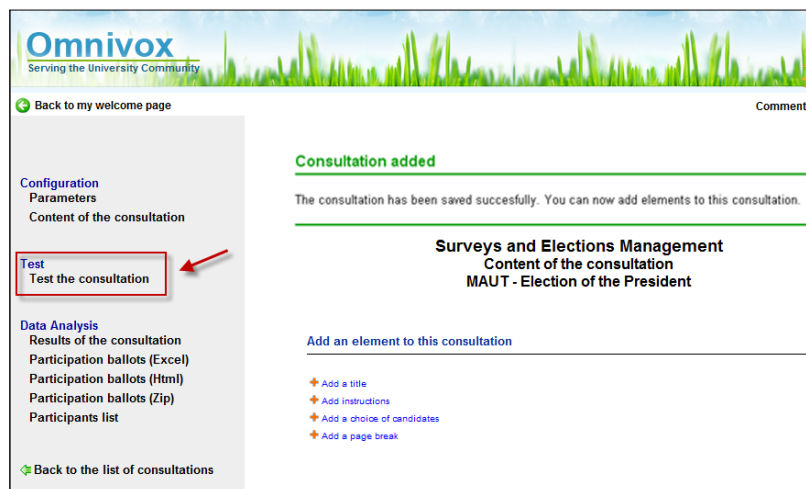
Position	Type	Content	Preview	Delete
1	Instruction	This election ballot has two parts, one for the election of the president of our...		
2	Title	Election of the president		
3	Instruction	There are three candidates to the presidency: Melissa...		
4	Candidate choice 1	Please vote for your favorite...		
5	Page break	Page break		
6	Title	Second part		
7	Candidate choice 2	Please vote for two Committee members		
8	Page break	Page break		
9	Instruction	Thank you for your participation		

Legend

- T Title
- ! Instruction
- ? Choice of candidates
- ← Page break



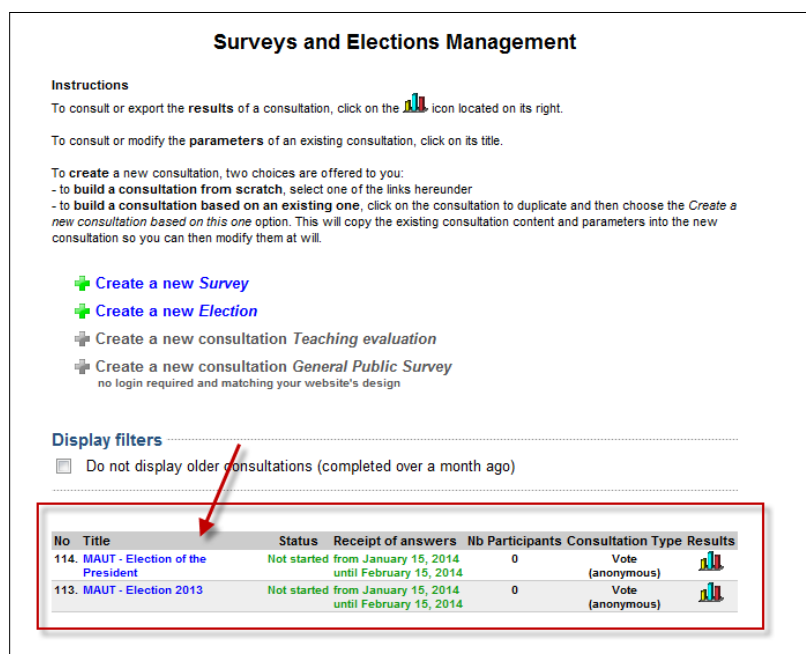
- To simulate an election or a survey, click **Test the consultation** on the sidebar.



Edit a consultation

Access an existing consultation and edit its parameters

On the **Surveys and Elections Management** screen, you will find your list of consultations. Click the consultation's title to access it.



The consultation's parameters appear.

Surveys and Elections Management
Parameters for the consultation
MAUT - Election 2013

Instructions
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

[+ Create a new consultation based on this one \(duplicate this consultation\)](#)

General information

Title: MAUT - Election 2013
The title identifies the consultation, for both its managers and respondents.

Start date: 2014 Jan 15 at Beginning of day

End of consultation: 2014 Feb 15 at End of day

Mode: ☒ Optional
The system will allow the users to take part in the consultation through the "Surveys and Election" module. A notification in the users' "What's new" section will also inform them of the presence of an uncompleted consultation.
☐ Mandatory

You can change the parameters. The **Start date** cannot be changed if the consultation has started. The **End date** can be changed any time.

Click the **Save** button at the bottom of the screen.

Edit the Content of a consultation

1. Access the consultation (see [Access an existing consultation](#) on the previous page)
2. Click **Content of the consultation** on the sidebar.

[Back to my welcome page](#) [Comments](#) [Quit](#)

Surveys and Elections Management
Parameters for the consultation
MAUT - Election 2013

Configuration
Parameters
Content of the consultation

Test
Test the consultation

Data Analysis
Results of the consultation
Participation ballots (Excel)
Participation ballots (Html)
Participation ballots (Zip)
Participants list

[+ Back to the list of consultations](#)

Instructions
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

[+ Create a new consultation based on this one \(duplicate this consultation\)](#)

General information

Title: MAUT - Election 2013
The title identifies the consultation, for both its managers and respondents.

Start date: 2014 Jan 15 at Beginning of day

End of consultation: 2014 Feb 15 at End of day

Mode: ☒ Optional
The system will allow the users to take part in the consultation through the "Surveys and Election" module. A notification in the users' "What's new" section will also inform them of the presence of an uncompleted consultation.
☐ Mandatory



You will be presented with the list of elements in the consultation. You can:

- Add a new element or edit an existing element
- Move an element to another position in the content
- Preview an element
- Delete an element
- Add a new choice of candidates by duplicating an existing one

[Comments](#)
[Quit](#)

Surveys and Elections Management

Content of the consultation

MAUT - Election 2013

[Add an element to this consultation](#)

[+ Add a title](#)
[+ Add instructions](#)
[+ Add a choice of candidates](#)
[+ Add a page break](#)

← Add a new element

Add a choice of candidates based on the following choice of candidates:

1. 1. <big>Please vote for your favorite... [Add](#)

← Add a new choice of candidates by duplicating an existing one

Move an element to a new position:

Element to move: Instructions - This election ballot has two parts, one for the election of the...

New position: at the beginning of the consultation [Move](#)

← Move an element

List of elements in the consultation

Position	Type	Content	Preview	Delete
⬆ ⬇ ⬇ ⬆	!	Instruction This election ballot has two parts, one for the election of the president of our...	🖥	🗑
⬆ ⬇ ⬇ ⬆	T	Title Election of the president	🖥	🗑
⬆ ⬇ ⬇ ⬆	!	Instruction There are three candidates to the presidency: <big>Melissa...	🖥	🗑
⬆ ⬇ ⬇ ⬆	?	Candidate choice 1 <big>Please vote for your favorite...	🖥	🗑
⬆ ⬇ ⬇ ⬆	←	Page break Page break		🗑
⬆ ⬇ ⬇ ⬆	T	Title Second part	🖥	🗑
⬆ ⬇ ⬇ ⬆	?	Candidate choice 2 Please vote for two Committee members	🖥	🗑
⬆ ⬇ ⬇ ⬆	←	Page break Page break		🗑
⬆ ⬇ ⬇ ⬆	!	Instruction Thank you for your participation	🖥	🗑

Legend

T Title

! Instruction

? Choice of candidates

← Page break

Move an element →

Click on the element to modify it

Delete an element

Preview an element



Test a consultation

If you want the consultation to be tested by people who do not have **Surveys and Elections management** rights, it is recommended to:

Create a test consultation

- Create the consultation (see [Create an e-election](#) or [Create an e-survey](#)) for an agreed date and time for the testers. (Note that the end date and time can always be changed). Do not add a group in the McGill directory (AD group) in the Filter section of the Parameters.
- Enter the McGill Usernames of the testers in the **List of Employees**.
- Add the content.
- Ask the testers to test the consultation.
- Modify the consultation based on the testing results.

Duplicate a test consultation

When the final version is ready:

- Access the test consultation (see [Access an existing consultation](#)).
- Click **Create a new consultation based on this one (duplicate this consultation)**.

Surveys and Elections Management
Parameters for the consultation
MAUT - Election 2013 - Test

Instructions
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

Create a new consultation based on this one (duplicate this consultation)

General information

Title: MAUT - Election 2013 - Test
The title identifies the consultation, for both its managers and respondents.

Start date: 2014 Jan 15 at Beginning of day

End of consultation: 2014 Feb 15 at End of day

Mode: This parameter can still be edited once the consultation has begun.
☒ Optional
The system will allow the users to take part in the consultation through the

- Modify the title if needed.
- Enter the proper dates and times.
- Select the AD group in the **Filter** section (see [Specify the participants of the e-election](#)).
- Remove the testers' McGill Usernames from the **List of Employees**.
- Click **Save** at the bottom of the screen.



Create an e-survey

Process

1. Set up the parameters of the new e-survey: title, dates and duration, participant population and the addition of personnel authorized to participate in the management of the consultation.
2. Add the content of the e-survey.


Procedure

Set up the parameters of the e-survey

1. Access the **Surveys and Elections Management** screen.
2. Click **Create a new Survey**.

Surveys and Elections Management

Instructions

To consult or export the **results** of a consultation, click on the  icon located on its right.

To consult or modify the **parameters** of an existing consultation, click on its title.

To **create** a new consultation, two choices are offered to you:

- to **build a consultation from scratch**, select one of the links hereunder
- to **build a consultation based on an existing one**, click on the consultation to duplicate and then choose the *Create a new consultation based on this one* option. This will copy the existing consultation content and parameters into the new consultation so you can then modify them at will.

[+ Create a new Survey](#)

[+ Create a new Election](#)

[+ Create a new consultation *Teaching evaluation*](#)

[+ Create a new consultation *General Public Survey*](#)
no login required and matching your website's design

Display filters

☐ Do not display older consultations (completed over a month ago)

No	Title	Status	Receipt of answers	Nb Participants	Consultation Type	Results
----	-------	--------	--------------------	-----------------	-------------------	---------

3. Fill in the **General information** section with the exception of the **Mode** and the **Demographics of participants**. Those two items do not apply to the McGill set up.

Surveys and Elections Management

New Survey

Instructions
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons that can access the consultation.

General information

Title	<input type="text" value="Survey about the food at McGill"/> <small>The title identifies the consultation, for both its managers and respondents.</small>
Start date	2013 ▾ Jun ▾ 12 ▾ at Beginning of day ▾
End of consultation	<p>The consultation will no longer be offered when one of the checked conditions will be met:</p> <p><input checked="" type="checkbox"/> at the following date:</p> <p>2013 ▾ Sep ▾ 15 ▾ at End of day ▾</p> <p><input checked="" type="checkbox"/> when 200 ▾ participations will have been received</p>
Mode	<p><small>This parameter can still be edited once the consultation has begun.</small></p> <p><input checked="" type="radio"/> Optional <small>The system will allow the users to take part in the consultation through the "Surveys and Election" module. A notification in the users' "What's new" section will also inform them of the presence of an uncompleted consultation.</small></p> <p><input type="radio"/> Mandatory <small>The system will make it mandatory for the users to answer the consultation. In order to access any other Omnivox service, users will first need to answer the consultation. We suggest you only use this option when absolutely necessary since it tends to irritate users</small></p>

- a) Enter the title in the **Title** box.
- b) Select a **Start Date**: **do not enter the real date**. Enter a date in a far future and when you are ready to make the survey available, enter the proper date.
- c) Specify when the consultation will end. It can be either:
 - A date:
check off **at the following date** and enter the date.
 - After a specific number of participations is reached:
check off **when x participations will have been received** and select a number in the dropdown list.
 - When one of the two conditions above is met.
check off both conditions and select a date and the number of participations.



- d) If you want the survey to be anonymous, check off **Gather ballots on anonymous basis**. You will not have access to participants' identities. A user will not be able to participate more than once.

Gathering of results	<input checked="" type="checkbox"/> Gather ballots on an anonymous basis You will not have access to participants' identities if this option is checked. However, just like for a consultation where the identity of each respondent is displayed on the Participation ballot, a user will not be able to answer the consultation more than once.
----------------------	---

- e) To allow the end user to save the results after each page instead of the end of the survey, check off **Save the results after each page change**.

Progressive save	<input type="radio"/> Save only the final results Allow to save the results only at the end of the consultation. <input checked="" type="radio"/> Save the results after each page change Allow to save the results at each page change. If the user does not complete the consultation, the completed pages will still be saved.
Send an email on reception of a participation	renee.lesage@mcgill.ca, renee-alice@hotmail.com When the system receives a new participation, an email with the content of the participation is sent to the list of addresses above. The email addresses must be separated by semi-colons. (ie: mister@domain.com;madam@domain.com)

- f) If you wish, enter an email address to receive a message with the content of the participations.
- Specify the participants of the survey. Do the same as for an e-election [on page 7 and 8](#) of this document.
 - If needed, give individuals the permission to manage the e-election. They will be able to edit the election and view the results.

Go to **Accessibility restrictions to this consultation's management**. This section shows the list of people having access as Surveys and Elections managers. Check off their McGill Usernames to give individuals the permission to manage the e-election.

Accessibility restrictions to this consultation's management	
Authorized personnel that can access management and results of this consultation	<input checked="" type="checkbox"/> RENEE.LESAGE@MCGILL.CA - Renee Lesage <input type="checkbox"/> MICHAEL.SAMPSON@MCGILL.CA - (ICS) Michael <input type="checkbox"/> RODNEY.JEAN-PAUL@MCGILL.CA - (ICS) Rodney <input type="checkbox"/> ANDREW.BITEEN@MCGILL.CA - Biteen (Secr) Andrew <input type="checkbox"/> CHRISTINE.CHEHADE@MCGILL.CA - Chehade (Secr) Christine <input type="checkbox"/> JOSIE.DAMICO@MCGILL.CA - D'Amico (Science) Josie <input type="checkbox"/> PAULINE.FRUXIONE@MCGILL.CA - Fruxione (Secr) Pauline <input type="checkbox"/> MARCUS.GILLIAM@MCGILL.CA - Gilliam (ICS) Marcus <input type="checkbox"/> NORMAN.KLING@MCGILL.CA - Kling (ISR) Norman <input checked="" type="checkbox"/> DAN.O'CONNELL@MCGILL.CA - O'Connell (ICS) Dan <input type="checkbox"/> ANGIE.PSARAKOS@MCGILL.CA - Psarakos Angie <input type="checkbox"/> SUSAN.SHARPE@MCGILL.CA - Sharpe (Arts) Susan <input type="checkbox"/> MARINA.TARTAKOVSKAIA@MCGILL.CA - Tartakovskaia Marina <input type="checkbox"/> JENNIFER.VIENS@MCGILL.CA - Viens (Arts) Jennifer <input type="checkbox"/> MALEK.YALAOUI@MCGILL.CA - Yalaoi (Science) Malek
<small>Only those persons who have access to the «Surveys and Elections Management» module appear on this list. To add another employee to the list, the person responsible for the «Management Interfaces» must give them access to the «Surveys and Elections Management» module.</small>	
<div style="text-align: right;"> <input type="button" value="Add"/> <input type="button" value="Cancel"/> </div>	

- Click **Add**. The **Content of the consultation** screen will appear.



Add the content of the e-survey

The list of elements that you can add to your survey shows on that page. Click + **Add *element name*** to add a new element.

Consultation added

The consultation has been saved successfully. You can now add elements to this consultation.

Surveys and Elections Management
Content of the consultation
Survey about the food at McGill

Add an element to this consultation

+ Add a title

+ Add instructions

+ Add a question with one or multiple answers to choose from
e.g. Have you ever studied in a program other than the one in which you are currently enrolled?
Which program(s) from the following interested you at the time you were applying for admission?

+ Add a question with answers to place in order of preference
e.g. Organize the following matters in order of preference.

+ Add a question with scaled answers
e.g. Evaluate the quality of teaching methods based on the indicated scale.

+ Add a question with no proposed answers
e.g. What would you change in the current program?

+ Add a question with numerical answer
e.g. How many hours a week do you spend studying outside regular course hours?

+ Add a page break

Title: add a title that is not the same as the global title added to the parameters. If your survey has many sections, you can add, for example, a title at the beginning of each section of the survey.

Instructions: any text that you want to add to the survey.

Questions: the types of questions that you can add are:

- With one or multiple answers
- With answers to place in order of preference
- With scaled answers
- With no proposed answers
- With a numerical answer

Page break: add a page break if you want to add another page to the survey.

View an example of a survey on the next page.





McGill

Consultation in
anonymous mode

Global title

Survey about the food services at
McGill

Page 1/2

Personal information

Title

This section is not required.

Instructions

1. Your department

- ☐
- ☐
- ☐
- ☐

ICS
NCS
CCS
Other

One or multiple
answers question

2. How many times a month do you eat in one the McGill food services?

Question with no
proposed answer

Quality of food

Title

3. Order of preference

-
-
-
-
-

Faculty club
Engineering café
Burnside café
Awocato café
Thompson house

Question with
answers to
place in
order of
preference

Comment

1

2

Page break

Next



Add a title and instructions (text): same as for the e-election (see [pages 12-13](#) of this document).

Add questions: click on **add a question with....** for the type of question that you wish to add.

- Select the desired options, add the elements of the question and click **Add**.
- Here is an example below of the **question with one or multiple choice answers**

New question

Parameters for questions with one or multiple choice answers

Text

What are your 2 most favorite types of food?

Settings

Insert position: after the question 3 - Order of preference

Number of possible answers

☐ The participant must select only one answer.

☒ The participant must choose exactly 2 choice of answers.

☐ The participant must choose between and choice of answers

☐ The participant must choose one answer from the list. (The parameter 'Allow free composition' is not available in this mode)

Mandatory answer

☒ If this box is checked, the participant must correctly answer the question in keeping with the number of possible answers. Otherwise, the participant may not answer.

☐ If there is a check in this box, Omnivox will allow the participant to enter a comment after the question.

Allow the participant to enter a comment

The text that will appear when a comment is being entered

Comment

Jump to an item

This option allows to define a section jump to another element of the consultation.

☒ Do not use a section jump for this item
Select this option if no section jump is required.

☐ Go to another section of the form
Use this option if one or many items must not be displayed to the respondent. For example, if the current item is 1 or if you wish the next item to be item 10, use this option.

Choice of answers

Text of possible answers	Allow free composition*
1. Chinese	<input type="checkbox"/> Remove
2. Indian	<input type="checkbox"/> Remove
3. Italian	<input type="checkbox"/> Remove

*The possibility of entering free composition allows you to create a choice of answers that the participant may choose from as well as to enter text. (e.g.: Other _____)

+ Add a choice of answers

Add

Enter your question

Select the position of the question in the survey

Select the number of possible answers

Is it a mandatory question?

Allow the end user to enter comments

You will see the **Jump to an item** option only if other questions are following. It is used to hide items in the questionnaire.

Click **Add a choice of answers** for every choice that you want to add

Save the question



The list of elements of the survey appears on the **Content of the Consultation** page.

Preview: see how to preview and test the consultation in this document on [page 17-18](#) and how to edit the consultation on [page 18-20](#)

View the results of a consultation

- Results of the consultation
 - You must wait after the end of the consultation to view the results. Only the author of the consultation and the people who were given the authorization by the author (see page 9 of this document) can view the results.
- The list of participants
 - For an election, the list is available before the consultation's end.
 - For a survey, the list of participants is not available if the anonymous option was selected for that survey.

To view the results or the list of participants:

1. Access the consultation
2. Click one of the items in the **Data Analysis** section of the sidebar.

The screenshot shows the 'Surveys and Elections Management' interface for 'Parameters for the consultation MAUT - Election 2013'. The sidebar on the left contains the following sections:

- Configuration**
 - Parameters
 - Content of the consultation
- Test**
 - Test the consultation
- Data Analysis** (highlighted with a red box)
 - Results of the consultation
 - Participation ballots (Excel)
 - Participation ballots (Html)
 - Participation ballots (Zip)
 - Participants list
- [Back to the list of consultations](#)

The main content area displays the following information:

Surveys and Elections Management
Parameters for the consultation
MAUT - Election 2013

Please carefully edit the parameters of this consultation, as it has been or is still available. According to the modified parameters, it is possible that they alter the meaning or outcome. We recommend that you review the changed settings to avoid all situations that may affect the results.

Instructions
Please define the parameters for the consultation. Once the consultation has begun, these parameters will no longer be changeable apart from the end date, the "Mandatory" indicator and the list of persons having direct access to the consultation.

Since this consultation is configured in Voting mode, ballots will not include the name of the participant, but will each carry a unique number.

The results for this consultation will only be made available once it is completed.

[+ Create a new consultation based on this one \(duplicate this consultation\)](#)

General information

Title	MAUT - Election 2013 <small>The title identifies the consultation, for both its managers and respondents.</small>
Start date	2013 June 12 at 00:00
End of consultation	2013 Jun 12 at 15:00



Participants list: opens an Excel spreadsheet listing the people who submitted their answers.


Results of the Consultation: view of the total number of answers for each choice. The answers to a question with no proposed answer are available only by accessing the **Participation ballots**.


[Configuration](#)
[Parameters](#)
[Content of the consultation](#)

[Test](#)
[Test the consultation](#)

[Data Analysis](#)
Results of the consultation
[Participation ballots \(Excel\)](#)
[Participation ballots \(Html\)](#)
[Participation ballots \(Zip\)](#)
[Participants list](#)

[Back to the list of consultations](#)




Consultation done via **Omnivox**
MAUT - Election 2013
from June 12, 2013 to June 12, 2013 at 15:00
2 respondents - Final results
[Click here for a printable version](#) 

MAUT - Election 2013

This consultation was conducted via Omnivox from June 12, 2013 until June 12, 2013 at 15:00. 2 respondents participated.

Display results

[Click here to apply the new display parameters](#) 

Received comments

For questions where the "Allow the participant to enter a comment" options was checked, you can display the text that was entered by participants. Note that text entries for questions with "free composition" are not displayed here.

☐ Display received comments
☒ Do not display received comments

Scale values

☐ Display scale values for each question
☒ Do not display scale values for each question

Results

Question 1

Please vote for your favorite candidate

1. Melissa Nguyen
2. Robert Young
3. Thierry Singer

Answers received

	Total
1. Melissa Nguyen	1 (50,0%)
2. Robert Young	1 (50,0%)
3. Thierry Singer	0 (0,0%)
Total	2 (100,0%)

Question 2

Please vote for two Committee members

1. Barbara Sinclair
2. Tony Smith
3. Lawrence Jones
4. Isabella Sabri

Answers received

	Total
1. Barbara Sinclair	1 (50,0%)
2. Tony Smith	0 (0,0%)
3. Lawrence Jones	1 (50,0%)
4. Isabella Sabri	2 (100,0%)
Total	2 (100,0%)



Participation ballots: view the details of each participation ballot in the format of your choice:

- An Excel spreadsheet.
- An HTML file. The participation ballots open in a new window in your internet browser.
- A zip file. You need to save the file on your computer and extract the files. There is a file for each participation ballot. For example, if 200 people participated in the survey, you will get 200 files when you extract the zip file.

Appendix

HTML codes

- HTML codes, also referred to as HTML tags, are keywords surrounded by angle brackets e.g. `<body>`.
- Generally tags come in pairs like: ` text `

`` is the opening tag

`` is the closing tag

- The closing tag is the same as the opening tag but with a forward slash before the tag name.
- There is always a tag before and after the text that you want to modify.

`<p>paragraph</p>`

- Different tags do different things, for example:

`<big> text </big>` for a larger font sized text.

` text ` to write in bold.

- You can also combine tags. Put your text between the tags like this to obtain the desired result:

`<big> I want this text to be larger and bold</big>`

- Some tags do not need to be in pairs. Here are two examples:

Line break: `
` It inserts a new line.

Horizontal line: `<hr />` It inserts a horizontal line.



See examples of HTML tags and the result on the next page.

HTML code

Result

<h1>This is a heading 1</h1>

This is a heading 1

<h2>This is a heading 2</h2>

This is a heading 2

<h3>This is a heading 3</h3>

This is a heading 3

bold

bold

 RED

RED

Bigger green

Bigger green

<u>underlined</u>

underlined

small blue

small blue

<p align="center"> center text </p>

center text

<big>BIG</big>

BIG

<small>small</small>

small

<u>This is a link</u>

This is a link

(Link to the McGill home page)



Look for McGill Usernames

Anyone who has access to the HR datawarehouse can retrieve McGill usernames in Minerva as follows:

1. Sign in to [Minerva](#).
2. Click on the **Reports** Tab.
3. Click on **HR Data Warehouse Query**.
4. In **Orgn***, select an organization or select all by clicking on ***** All the Orgn on this list *****
5. In **Group Data***, click on **Personal Information Columns**.
6. Scroll down towards the bottom and click **Submit**.
7. You can download this report to Excel. There is a download icon at both the top and the bottom of the report. When the small popup screen comes up, choose to **SAVE** the file to your computer as the **OPEN** command takes a long time to run.
8. **McGill Username** is at the far right of the file. You can delete all of the columns **except** for **McGill Username**.

AD group name standards

The AD group names have the following structure: **aaa-bbbbbbb_ccccccc_yyyy-mm**

E.g. 095-Election_Art_History_2013-05
101-Election_Economics_2013-05

aaa	Organizational code of the unit (or on behalf of which) is conducting the election or survey e.g. 101 = Economics
bbbbbbb	Type of consultation: Election or Survey
ccccccc	Description of the consultation. E.g. "Sociology" or "Sociology_Chair".
YYYY-mm	The year and month around which the election or survey is expected to be conducted. It does not matter if the consultation crosses 2 calendar months or if the consultation is delayed.